

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

TABLE OF CONTENTS

M.1	<u>FAR PROVISIONS AND CLAUSES INCORPORATED BY REFERENCE</u>	M - 1
M.1.2	<u>52.217-5 EVALUATION OF OPTIONS (JUL 1990) Reference 17.208)</u>	M - 1
M.2	<u>GENERAL</u>	M - 1
M.3	<u>BASIS FOR AWARD</u>	M - 2
M.4	<u>OPTIONS</u>	M - 3
M.5	<u>AWARD OF FULL QUANTITY</u>	M - 3
M.6	<u>PRE-AWARD SURVEY</u>	M - 3
M.7	<u>EXCHANGES WITH OFFERORS</u>	M - 4
M.8	<u>EVALUATION OF PROPOSALS</u>	M - 4
M.8.1	<u>PROPOSAL PREPARATION COMPLIANCE DETERMINATION</u>	M - 4
M.8.2	<u>CMM® LEVEL 2 COMPLIANCE DETERMINATION</u>	M - 4
M.8.3	<u>COST PROPOSAL</u>	M - 5
M.8.4	<u>TECHNICAL PROPOSAL</u>	M - 6
M.8.4.1	<u>TECHNICAL EVALUATION FACTORS</u>	M - 6
M.8.4.2	<u>TECHNICAL SECTION A – PRINCIPLE TASK AREAS</u>	M - 8
M.8.4.2.1	<u>PROJECT PROFILES (PART A)</u>	M - 8
M.8.4.2.2	<u>PAST PERFORMANCE QUESTIONNAIRES (PART B)</u>	M - 8

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.8.4.3	<u>TECHNICAL SECTION B – CORPORATE</u>	M - 9
M.8.4.3.1	<u>KEY MANAGEMENT PERSONNEL RÉSUMÉS</u>	M - 9
M.8.4.3.2	<u>MANAGEMENT APPROACH (ORAL PRESENTATION)</u>	M - 9
M.8.4.3.3	<u>MANAGEMENT SCENARIO (ORAL PRESENTATION)</u>	M - 11
M.8.5	<u>SMALL DISADVANTAGED BUSINESS PARTICIPATION (F&O ONLY)</u>	M- 11
M.8.6	<u>EVALUATION SCORING</u>	M - 14

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.1 FAR PROVISIONS AND CLAUSES INCORPORATED BY REFERENCE

M.1.2. 52.217-5 EVALUATION OF OPTIONS (JUL 1990) (Reference 17.208)

M.2 GENERAL

Section M sets forth the evaluation factors and criteria for award. To be considered for award, proposals shall be submitted in accordance with the instructions set forth in Section L and meet all of the requirements in this Request for Proposal.

The Government intends to evaluate proposals and may award contracts without discussions with Offerors; therefore, each initial offer should contain the Offeror's best terms from a cost or price and technical standpoint. The Government, however, reserves the right to conduct discussions if later determined by the Contracting Officer to be necessary (reference Section M, Exchanges with Offerors). The Government may also reduce the number of highly rated proposals within the competitive range for purposes of efficiency.

Each Offeror is expected to submit a complete and acceptable proposal. Such a proposal: (1) is for the total requirement and scope stated in the Request for Proposals (RFP) and; (2) accepts each of the requirements, provisions, terms and conditions, and clauses stated in RFP Sections C, D, E, F, G, H, I, J, K and L.

Proposals that require a substantial revision or addendum, because of significant omissions or information requested in RFP Section L or because of other deficiencies in (1) and (2) above may be found unacceptable. Mere restatement of the requirements, or, statements from the Offeror that the proposal is compliant with the RFP without a description of the approaches, techniques, solutions, or processes proposed to satisfy the technical requirements, may be grounds for the Government to assign a very low score for those items. Generally speaking, "generic" information scores lower than information "well tailored" to the Government's environment.

As stated in Section L, alternate proposals will not be accepted.

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.3 BASIS FOR AWARD

The Government intends to award multiple contracts. Reference Section L, Multiple Awards.

It is the Government's objective under this solicitation to make a sufficient number of awards, approximately two (2) to twelve (12), so that each of the four (4) Principle Task Areas in Section C has been awarded to at least two (2) Offerors. However, no awards will be made that are not in the best interest of the Government simply to provide coverage in all task areas. Notwithstanding, the Government is not obligated to award any particular number of contracts as a result of this solicitation. In the Full and Open Competition, an Offeror must be successful in the Information Systems Services Principle Task Area in order to receive awards in any other Principle Task Areas.

Each Offeror's technical proposal will be evaluated in accordance with the criteria described in this section. It is important that the Offeror direct the proposal to the criteria and cover each appropriately in response to the solicitation requirements. The Government is more concerned with obtaining superior technical capability than making an award at the lowest cost. All evaluation factors other than cost or price, when combined, are significantly more important than cost or price. The evaluation of the Offeror's cost proposal will be of secondary importance to the evaluation of technical proposals in making award under this solicitation. Although cost is of less importance than the technical factors, taken as a whole, it is a factor and will not be ignored. The importance of cost will increase as the difference in technical proposals decreases. Furthermore, costs will be evaluated on the basis of cost realism and reasonableness.

The source evaluation will be based on a "Best Value Analysis." Best Value means the expected outcome of an acquisition that, in the Government's estimation, provides the greatest overall benefit in response to the requirement.

The Source Selection Authority (SSA) will determine which responsible technically acceptable Offeror(s) provides the greatest overall benefit to the Government, price and other factors considered, and will authorize an award to that Offeror(s). The SSA will not be strictly bound by the ratings. In reaching a decision, the SSA retains the discretion to balance the technical merits of each proposal against the proposed overall price and each other to determine the best value to the Government. An award may be made to a lower priced proposal, although its technical rating is lower. If the SSA determines that the technical difference represents a technical advantage and the best value to the Government, the SSA may award to such proposal at a higher evaluated

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

cost. The decision will be made at the discretion of the SSA and will depend on the facts and circumstances of the procurement.

Accordingly, award will be made to the responsible and technically acceptable Offeror(s) whose proposal (including information from the oral presentation) containing the combination of technical and cost features, provides the greatest overall benefit to the Government.

M.4 OPTIONS

Except when it is determined in accordance with FAR 17.206(b) not to be in the Government's best interests, the Government will evaluate offers for award purposes by adding the total price for all options to the total price for the basic requirement. Evaluation of options will not obligate the Government to exercise the option(s).

For award purposes, in addition to an Offeror's response to the basic requirement, the Government will evaluate the Offeror's technical and cost response to all contract options. The total evaluated Cost-Plus-Fixed-Fee (CPFF) will be computed by adding the total CPFF for all options as specified in Section B to the total CPFF for the basic requirement. These costs will not be adjusted by discount factors. Evaluation of options will not obligate the Government to exercise the options. Offers containing any charges for failure to exercise any option will be rejected.

M.5 AWARD OF FULL QUANTITY

In order to be eligible for award, Offerors must submit cost information for all line items (including all option line items) listed in Section B of this solicitation for each Principle Task Areas proposed.

M.6 PRE-AWARD SURVEY

The Government may conduct a complete or partial pre-award survey of prospective Offerors. The following factors, while not all inclusive, may be investigated during the survey and any findings will be considered in the evaluation process:

1. Technical Capability
2. Financial Capability
3. Purchasing and Subcontracting
4. Accounting System
5. Quality Assurance Capability

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

6. Plant Safety
7. Labor Resource
8. Performance Record
9. Ability to meet required schedule
10. Ability to provide the required support
11. Security Clearance

M.7 EXCHANGES WITH OFFERORS

The Government may engage in exchanges with Offerors in accordance with FAR 15.306. Discussions with Offerors will be based on the Government's integrated assessment and analysis of the Offeror's proposal and conducted for the purpose of maximizing the Government's ability to obtain best value, based on the requirement and evaluation factors set forth in the solicitation.

Offerors will be given the opportunity to address adverse past performance information identified in the Dun and Bradstreet Reports and any supplemental past performance data collected (if applicable) in accordance with FAR Subpart 15.306.

M.8 EVALUATION OF PROPOSALS

M.8.1 PROPOSAL PREPARATION COMPLIANCE DETERMINATION

The Government will review proposals submitted to determine compliance with the proposal preparation instructions, compliance with the terms and conditions of the proposed contract, and other administrative conditions with which the Offeror shall comply to receive further consideration.

M.8.2 CMM[®] LEVEL 2 COMPLIANCE DETERMINATION

Evaluation of the CMM[®] Level 2 compliance requirement will be on a pass/fail basis. Refer to Section J, IRS Capability Maturity Model (CMM[®]) Requirements and Instructions, for validation requirements for CMM[®] Level 2 compliance.

All Offerors competing under the Full and Open competition, must meet the CMM[®] Level 2 requirement to be considered for further evaluation. Offerors competing under the F&O competition not meeting the CMM[®] requirement will be eliminated from the competition and notified in writing promptly by the Government.

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

Offerors competing under the Partial Small Business Set-Aside may be awarded a contract without meeting the CMM[®] Level 2 requirement. However, only awardees satisfying the CMM[®] Level 2 requirement, will be allowed to compete for IRS software development life cycle task orders in the Principle Task Areas that they received awards. [Note: This CMM[®] Level 2 compliance is not required to be awarded task orders for the Department of the Treasury and their Bureaus other than the IRS (reference Section H, Software Development Prerequisite Capability Maturity Model CMM[®])].

M.8.3 COST PROPOSAL

Cost will be evaluated, but will not be assigned a numerical score or weight. The Government will review the overall costs of each Offeror's proposal to determine if costs are realistic for the work to be performed, reflect a clear understanding of the requirements, and are consistent with the Offeror's Management and Technical proposals. In evaluating cost proposals (Volume III), the Government may adjust the rates proposed by the Offeror, based on a cost realism evaluation. A risk assessment of unrealistic rates will be considered in making the source selection decision.

The following forms the basis of the cost evaluation:

- (1) Reasonableness, realism and appropriateness of the labor rates for the labor categories of the contract. Completeness of documentation supporting the proposed rates and the methodology of rate escalation.
- (2) Reasonableness and realism of the proposed annual escalation factor for labor costs.
- (3) Reasonableness and realism of all proposed indirect rates. Clarity and completeness of supporting documentation.
- (4) Reasonableness and realism of subcontract proposals. Completeness of subcontract packages.

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.8.4 TECHNICAL PROPOSAL

M.8.4.1 TECHNICAL EVALUATION FACTORS

Technical evaluation will be in two parts: Technical Evaluation Part A and Technical Evaluation Part B. After evaluation of Technical Evaluation Part A, the Government may eliminate proposals from the competitive range. Each proposal will be evaluated to determine the Offeror's demonstrated ability to provide information technology support services within the framework of the scope of this acquisition. The Government will rank the Offeror's capability in each area as "Outstanding, Very Good, Satisfactory, Marginal, Unsatisfactory or N/A" and the risk associated with the Offeror's ability to perform in that area. The rating system defined below will be applied to the Technical Evaluations for Sections A & B.

<u>RATING</u>	<u>DESCRIPTION</u>
OUTSTANDING	<p>Proposal is outstanding; greatly exceeds the Government's minimum requirements.</p> <ol style="list-style-type: none">1) The proposal meets the fullest expectations of the Government by being very comprehensive, in-depth, clear, accurate, innovative, believable, and of the highest quality.2) Offeror's proposed capability or proposed effort is of the highest quality and thoroughly justified or substantiated.3) Total internal consistency and no incompatibility with other portions of proposed efforts.4) Proposal has significant advantage(s) in meeting the RFP requirement(s), which is not offset by a disadvantage(s).
VERY GOOD	<p>Proposal is good; exceeds the Government's minimum requirements with one or more strengths and no weaknesses.</p> <ol style="list-style-type: none">1) Offeror's proposed capability or proposed effort is high quality and is well justified or substantiated.2) No or very minor inconsistencies or incompatibilities with other portions of the proposed efforts.3) Proposal has an advantage(s) in meeting the requirements of the RFP, which is not offset by a disadvantage(s) or has only a minor disadvantage(s).

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

SATISFACTORY Proposal is acceptable; meets the Government's minimum requirements with no significant weaknesses.

- 1) Offeror's proposed capability or proposed effort is of an acceptable level of quality and justified or substantiated.
- 2) No significant inconsistencies or incompatibilities with other portions of proposed efforts.
- 3) Proposal has neither an advantage(s) nor a disadvantage(s).

MARGINAL Proposal is susceptible for improvement and contains significant weaknesses.

- 1) Fails to meet evaluation standards.
- 2) Has a low probability of satisfying the requirements.
- 3) Has significant deficiencies but correctable.
- 4) Proposal does not have any advantage(s) in meeting the requirements of the RFP and has a significant disadvantage(s).

UNSATISFACTORY Proposal is unacceptable.

- 1) Government's minimum requirements are not met.
- 2) The Offeror's proposal lacks evidence of capability to perform proposed effort.
- 3) Numerous major inconsistencies and significant disadvantages exist.
- 4) Proposal has minimal or no chance of success.

The Technical Proposal will be an important factor in the selection of the Offeror, and shall be specific and complete. Each Offeror, in the Technical Proposal, shall present the information necessary to provide a basis for evaluation by the Government of the Offeror's Past Performance (Project Profiles and Past Performance Reports) and Corporate (Key Management Personnel Résumés, Management Approach and Management Scenario slides) qualifications. In the Full and Open Competition, an Offeror must be successful in the Information Systems Services Principle Task Area in order to receive awards in any other Principle Task Areas.

In the case of a relatively new firm, past performance of Key Management Personnel within the company may also be used to substantiate past performance of the Offeror or corporation. In any case, the Government reserves the right to utilize information obtained from other sources.

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.8.4.2 TECHNICAL SECTION A - PRINCIPLE TASK AREAS

Evaluation of Volume II, Technical Section A will consist of two subfactors: 1) Project Profiles; and 2) the information from the Past Performance Questionnaires, as described below.

M.8.4.2.1 PROJECT PROFILES (PART A)

Project Profiles will be evaluated on the extent the description of the Offeror's experience relates to the Principle Task Areas for which they are competing. It is important to the Government that the experiences are direct, relevant to the environment of TIPSS-2 and of sufficient duration to demonstrate a continuing expertise on the part of the Offeror. The Government will focus on the Offeror's ability to achieve the project's stated objective timely and within budget and the Offeror's innovativeness and resourcefulness in meeting the project's objectives. The Government will also focus on the Offeror's ability to identify problems and difficulties, to formulate and implement remedies and to apply appropriate personnel.

M.8.4.2.2 PAST PERFORMANCE QUESTIONNAIRES (PART B)

Part 1 - General Information

Part 1 will be evaluated by the Government for relevance to the requirements in Section C. The type of work, the size and locations(s) of the work, the similarity of the hardware and software to the Government's environment, as well as the contract types that the work was performed in will be evaluated. The Government will examine closely the size/value of their task orders and experience with the hardware and software systems identified in Section J, List of Current IRS Systems. For purposes of this evaluation, a Task Order is considered average if their Level of Effort > 6000 hours and/or value of task >\$350,000 (F&O), Level of Effort > 4000 hours and/or value of task >\$250,000 (SB). The Government expects Full and Open competition Offerors to have greater exposure and experience with large, multiple vendor task order contracts than Offerors competing under the Partial Small Business Set-Aside.

Part 2 - Offeror Past Performance Rating

A Summary of Part 2, as reported in the Dun and Bradstreet Reports, will be used to assess customers' overall satisfaction with the Offeror's performance. In its assessment of the Offeror's past performance, the Government will consider such elements as management of complex contracts/projects, quality of products/services, cost and

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

schedule, recruiting and retention, subcontractor management, and customer satisfaction. The Government will evaluate the data provided by D&B.

The Government will evaluate any information submitted by the Offeror in its proposal regarding past performance problems encountered on identified contracts and the Offeror's corrective actions taken.

M.8.4.3. TECHNICAL SECTION B - CORPORATE

The Government will begin its evaluation with the Key Management Personnel Résumés. The Offeror shall provide Key Management Personnel résumés confirming that they have the education, experience and functional responsibility to successfully manage a multiple Task Order contract. The functional requirements for key personnel in the corporate area are defined in Section C, Corporate Area, for TIPSS-2.

Evaluation of the Management Approach and response to the Management Scenario will be based on the Offeror's oral presentation.

During the Management Approach oral presentation the Offeror shall describe their corporate capability in the areas of: Program/Project Management; Staffing, Recruitment and Retention; Quality Assurance; Cost/Schedule Management and Subcontractor Management. Offerors will also describe their organizational structure using the Organizational Chart provided in their proposal.

The individuals designated as Key Management Personnel (reference Section H, Key Personnel) must present the Offeror's oral presentation. Each Key Management Personnel individual shall present the element(s) of the oral presentation, which comprise the individual's area of expertise.

M.8.4.3.1. KEY MANAGEMENT PERSONNEL RÉSUMÉS

Résumés will be evaluated on the education and experience required to successfully manage the functions defined in Section C, Corporate Area, for TIPSS-2.

M.8.4.3.2 MANAGEMENT APPROACH (ORAL PRESENTATION)

The Offeror's Management Approach shall address the Offeror's understanding of and approach to the contract management requirements of this solicitation. In its assessment of the Offeror's Management Approach, the Government will consider such elements as:

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

- Program/Project Management
- Recruitment and Retention
- Quality Assurance
- Cost and Schedule Control
- Organizational Structure
- Subcontractor Management

(a) Program/Project Management

The Offeror's Management Approach will be evaluated on the extent of the Offeror's understanding of this solicitation's requirements and comprehensiveness of the Offeror's plan for managing this contract after a sustained award. Proposals will be evaluated on the quality and soundness of the business practices for performing, monitoring and managing multiple task orders awarded under TIPSS-2.

(b) Staffing, Recruitment and Retention

The Offeror's Management Approach will be evaluated on the staffing techniques for acquiring quality personnel in the Washington D.C. area as well as other areas of the country; workforce improvement processes (e.g., new technological skills); and initial workforce for TIPSS-2. The Government is interested in the stability of the personnel as well as their quality and therefore will also evaluate the Offeror's ability to maintain a qualified workforce.

(c) Quality Assurance

The Offeror's quality assurance processes and procedures will be evaluated by their ability to identify Task Order or contract level deliverables that will be acceptable to the Government. It is the Offeror's responsibility to have established, and be ready to use, quality measures, follow-up procedures and process improvement activities. The Government will evaluate these quality measures and procedures for feasibility and effectiveness with respect to reviewing multiple deliverables from multiple tasks/sites.

(d) Cost and Schedule Control

Evaluation of the Cost and Schedule Control section of the Management Approach will focus on the Offeror's ability to establish a baseline and to measure costs and schedules against that baseline. The Government will evaluate the effectiveness and feasibility of the mechanisms proposed to control costs and scheduling as well as company policies for deviation and problem resolution; estimating cost; and reporting. The Government will also evaluate the processes to be utilized during contract

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

performance that will keep the Contracting Officer's Technical Representatives (COTR), Contracting Officers (CO), and Lead Contracting Officer's Technical Representatives (Lead COTR) informed of potential overruns or underruns.

(e) Organizational Structure

The Organizational Structure will be evaluated to determine the Offeror's commitment to the elements described in their Corporate Management Approach. The Offeror's management, administrative, and other support staff (e.g., Program Manager, Business Manager, Project Manager, and Quality Assurance personnel) will also be evaluated to ascertain the Offeror's adequacy to effectively manage and administer a multi task order environment as required by TIPSS-2, including the degree of authority each position will exercise.

(f) Subcontractor Management

Evaluation of the Subcontractor Management section of the proposal will focus on the type and level of support that will be obtained from Subcontractors. The Offeror will be evaluated on how the need for subcontracting is identified, and the process for coordination and integration of the Subcontractors' efforts into those of the Offeror. The Government will evaluate the methods to be used to oversee the Subcontractors' performance, with specific attention to how the Offeror will verify that the Subcontractors' efforts satisfy the requirements of Task Order(s) and the coordination and integration of subcontractor efforts into those of the Offeror.

M.8.4.3.3 MANAGEMENT SCENARIO (ORAL PRESENTATION)

The Government will evaluate the oral presentation of the Offeror's corporate ability to identify the issues and their steps towards a solution to the Government's management scenario. The Government will evaluate the Offeror on their use of the elements of their Management Approach to provide a lasting, viable solution to the scenario.

M.8.5 SMALL DISADVANTAGED BUSINESS PARTICIPATION (F&O ONLY)

Two factors will be considered under the Small Disadvantaged Business Participation factor. One element will be the subcontracting plan. Note: Subcontracting Plan is only for the Full and Open competitors. The second element will be the Small Business Participation Factor, prescribed in FAR subpart 19.12.

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

1. Subcontracting Plan. The evaluation of this factor will consider the Offeror's proposed small business and small disadvantaged business subcontracting plan submitted in accordance with Section L.

The Offeror's proposed plan will be evaluated to determine whether it represents the maximum practicable opportunity for subcontracting. Maximum practicable opportunity is defined as reaching or exceeding the IRS goals specified in Section J, Attachment entitled "Subcontracting Plan Outline." The Offeror's record of previous performance in carrying out the goals of the subcontracting plan will be considered for this factor. Also included in the evaluation will be the Offerors' compliance with subcontracting goals for small disadvantaged business (SDB) concerns, monetary targets for SDB participation, and notifications submitted under FAR Subpart 19.1202-4(b).

(Note: Since subcontracting goals represent thresholds which each Offeror will make a good faith effort to meet, no zero goals will be accepted in any subcontracting plan.)

- a. The Government will measure the extent of participation of small businesses, hub zone small businesses, small disadvantaged businesses, and women-owned business utilization proposed. This will be measured by comparing the cumulative dollar value of proposed subcontract awards projected for each procurement preference group specified for the base year and all options as a percentage of the total proposed price of performance for the base year and all options.
- b. The Government will measure the effectiveness of the methods used by each Offeror to involve the small businesses, hub zone small businesses, small disadvantaged businesses, and women-owned business in recently completed contracts covered by subcontracting plans. Historical effectiveness will be measured by reviewing results from recently completed contracts covered by subcontracting plans and the results of the most recent Small Business Compliance Reviews. The Government will consider factors such as: 1) whether firms have met all subcontracting goals on any plan contained in any Federal contract completed within the past twelve months AND whose most recent Small Business Program Compliance Review resulted in an overall rating of at least "fully acceptable" or equivalent. 2) whether firms have missed subcontracting goals on plans contained in Federal contracts completed within the past twelve months, for reasons which were fully accepted by the cognizant contracting officer, and whose most recent Small Business Compliance Review resulted in an overall rating of at least "fully acceptable" or equivalent; and 3) whether Offerors either missed subcontractor goals contained in Federal contracts completed within the past

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

12 months for reasons unacceptable to the cognizant contracting officer, OR offerors most recent Small Business Compliance Review which resulted in an overall rating of less than "fully acceptable" or equivalent.

2. Small Disadvantaged Business Participation. This factor consists of two evaluation elements. One element evaluates the extent of involvement of SIC targeted small disadvantages business (SDB) firms. The second element evaluates the extent to which specific targeted SDB firms are specifically identified. During the evaluation, the Government will consider the following:

- a. The extent of involvement which the SIC targeted SDB firms have in the total contract. This shall be evaluated by comparing the total estimated dollars anticipated to be awarded to SIC targeted SDB groups for the base year and all options as a percentage of the total estimated value of the contract in its entirety including the base year. This comparison will be expressed as a single percentage.
- b. The extent to which the detailed identification of specific SIC targeted SDB firms has been provided. This solicitation contains two relevant sample forms in Section L: one entitled "Identification List of Small Disadvantaged Business Firms in targeted SIC Codes Projected to be used on this project;" and one entitled "Summary Sheet for Cumulative Target SIC SDB Data by Category." Each Offeror competing under the F&O competition is required to submit all of the information required on both of these forms, either using these specific forms, or developing an alternate format which contains all the information requested on both sample forms provided.

(Continued on Next Page)

SOLICITATION NUMBER TIRNO-99-R-00009
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION M - EVALUATION FACTORS FOR AWARD

M.8.6 EVALUATION SCORING

The following chart reflects the potential maximum scores an Offeror could receive for the evaluation for each Principle Task Area. Technical - Section A - is an evaluation of each Principle Task Area. Technical Evaluation B is an evaluation of each Offeror's Corporate Information. Technical Evaluation B will be completed once for each Offeror and the same score added in for each Principle Task Area proposed.

Evaluation	Full and Open Competition	Partial Small Business Set-Aside
Technical - Section A - (Per Principle Task Area) Project Profiles Past Performance Questionnaire Total Points for Section A (Per Principle Task Area)	100 <u>50</u> 150	100 <u>50</u> 150
Cost/Price	No points assigned	No points assigned

Technical - Section B - Corporate Key Management Personnel Résumés Management Approach/Management Scenario Total Points for Section B	25 <u>75</u> 100	25 <u>75</u> 100
SB Usage Points (F&O only)	10*	

TOTAL POINTS	250*(260)	250
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* Denotes total points if Offeror elects to take price adjustment.

(End Of Section)